Chapter 13: Visual Editing

In SEER*DMS, all data for a registrant are ultimately stored in a single packet of data known as a "Patient Set." Each Patient Set contains the data consolidated from the patient's source records and linkage information to enable access to the source records. Patient set data fields contain the consolidated and/or summarized values of the linked source records, and values that were derived or computed by SEER*DMS polishers. Original data values are maintained in record data fields.

Quality control of new data involves the review of edit errors identified by the computerized edits and a visual review of data fields. Primarily, these reviews are performed during one of the following worklist tasks:

- The Visual Edit Patient Set task enables registrars to visually review data when a new patient set is created from an incoming record or records. This task will also be created if a patient set is auto-created from a death certificate, casefinding, or short health record using one of the Build CTC system tasks.
- Consolidation tasks enable registrars to visually review incoming data as they consolidate the data with other data previously loaded into the system.

The errors identified by the computerized edits may also be resolved in either of these tasks, or the patient set may be saved with errors and forwarded to a Resolve Patient Set Errors task.

In this chapter, you'll learn about

- Opening a Visual Edit Patient Set Task
- Visually Editing Patient Set Data
- Saving Changes to a Patient Set
- Undoing Changes
- Requesting Follow-back Information

Opening a Visual Edit Patient Set Task

Requires system permission: *vis_edit_pat* and *pat_edit* are required; *pat_edit_override* is needed if all edits are to be resolved in this task

Unassigned Visual Edit Patient Set tasks are created by the Build CTC system tasks that may be periodically used to build CTCs from casefinding, death certificate, short health, or other records that may be used to build CTCs. However, most Visual Edit Patient Set tasks are created at the conclusion of the manual Match-Consolidate task. This occurs when no matches are found for the incoming record and the record can be used to create a new patient set. If the user reviewing the match has the *vis_edit_pat* and *pat_edit* system permissions, the Visual Edit Patient Set task will be opened automatically at the end of the Match-Consolidate task. Otherwise, the task will be available as an unassigned task in the worklist.

Once any Visual Edit Patient Set task is opened by a user, it is assigned to that user's worklist. Follow the steps below to open a Visual Edit Patient Set task that was created and stored in the worklist.

To open a Visual Edit Patient Set task in the worklist:

1. Click a **Visual Edit Patient Set** link in the worklist summary on the home page. To resume a task assigned to you, click the link listed in **My Tasks**. To open an unassigned task, click the link listed in the **Unassigned Tasks**.

2. To search for the task in your tasks and unassigned tasks:

a. Enter your user name in the **User(s)** filter.

b. Check the **Show Unassigned** box.

3. To search for a specific task, enter search criteria in the Worklist filters. Common filters to use when searching for a Visual Edit Patient Set task are:

   a. **Task ID(s)** – The complete task ID must be entered.

   b. **Pat/Rec ID(s)** – A full or partial patient set ID may be entered.

   c. **Facility** – A full or partial ID may be entered. Use the lookup icon to search for a facility ID.

   d. **DX Year** – Use the DX Year filter to search for tasks by year of diagnosis. Use a hyphen to select a range of years (e.g., *2002-2004*). Use a comma to select separate years (e.g., *2002, 2004*).

   e. **Information** – In a Visual Edit Patient Set task, this filter can be used to search by patient name. To match a complete phrase, enclose it in quotes (e.g., *"Smith, John"*). If you enter *John Smith* or *Smith, John* without quotes, tasks related to patients named either John or Smith will be returned (the list could include names such as John Smith, John Doe, and William Smith).

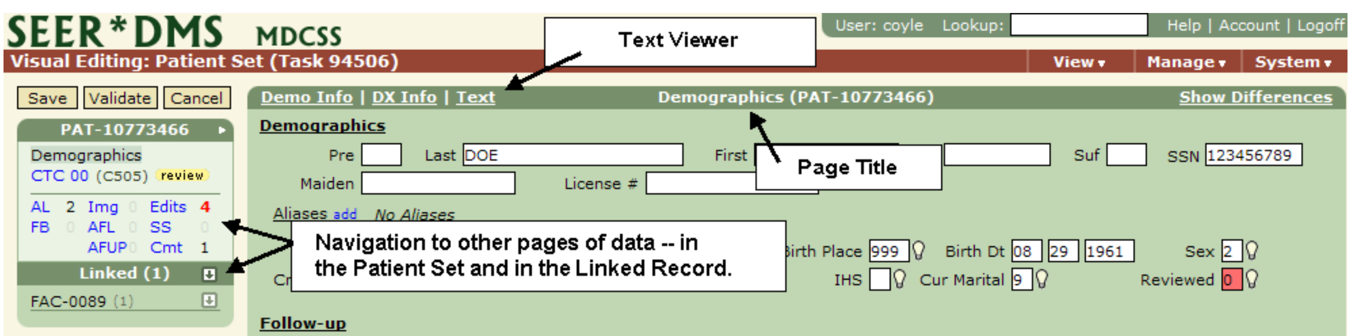
4. If you made changes to the filter settings, click **Apply**.

5. Click the task **ID** to open a Visual Edit Patient Set task.

Visually Editing Patient Set Data

Requires system permission: *pat_edit*

To create a new patient set, SEER*DMS auto-builds the patient set data fields from the record data. Values are copied from record data fields to the corresponding patient set data fields, or values are computed from related record data field(s). The process of auto-building is described in the *SEER*DMS Technical Reference*. When you open a Visual Edit Patient Set task, the patient set data will be displayed in an editor similar to the one shown below (only a partial page is shown in the example).



To visually edit the patient set data:

1. The patient set data are presented on multiple pages in the editor. You can use the links in the navigation box to move from page to page as you edit. Three indicators are used to show which page is being displayed:

   a. The title of the page includes the page name and the patient set or record ID.

b. In the patient set navigation box, the name of the current page is shaded.

c. In the patient set navigation box, a lighter background is used to indicate if the patient set or the linked record is being displayed. In the example above, a lighter shade of green is used for the patient set's section of the navigation box.

2. Start with the first page of the patient set data. If you are not viewing the patient set's Demographics page, click **Demographics** in the patient set navigation box.

3. SEER*DMS facilitates the visual editing process by providing a convenient mechanism to review supporting text fields as you edit the data. To view the supporting text fields as you edit, click the **Text** link to the left of the page title. The Text Viewer pop-up window will open. You may need to resize or move the main and/or pop-up windows to edit a field on a data page while displaying the Text Viewer. To close the pop-up, click the Close button or click the in the upper right corner of the window.

4. Review the data on the current page and modify data fields, as necessary. More specific instructions for changing the value of individual data fields are provided in *Chapter 11: The Patient Set Editor*.

5. Review and resolve edit errors in the patient set. Specific instructions for correcting the errors are provided in *Chapter 14: Resolving Patient Set Errors*. You have the option of resolving all errors during the Visual Edit Patient Set task or forwarding the patient set to a Resolve Patient Set Errors task. (Note: Whenever you are editing patient set data, ignore edit errors in record data fields. In the patient set editor, record data fields are displayed in read only mode by default. The errors should be resolved in the patient set data fields.)

6. In the patient navigation box, click the CTC link. Move through and visually edit each page of CTC data (CTC, Facility, each TX and TXr page, Summary TX) by repeating steps 3-5. Review the notes entered by other registrars and system messages in the Comment page. Whenever editing patient data, you may enter notes on the Comment page as appropriate.

7. Once you have visually edited data on all pages, save your changes and exit the task according to the instructions in the *Saving Changes to a Patient Set* section of this chapter.

Saving Changes to a Patient Set

Requires system permission: *pat_edit*

When you complete a Visual Edit Patient Set task, the patient set is either forwarded to a Resolve Patient Set Errors task, or it exits the workflow. If all edit errors were resolved during the editing process, the final automated checks are performed and the patient set exits the workflow. A task related to the patient set will not exist in the worklist until new data for the patient enters the system, initiating a matching or consolidation task. To update or view the patient set, use the patient lookup feature to search the database (see *Chapter 20: Searching for Records and Patients*).

Review the following methods for saving changes and for exiting the Visual Edit Patient Set task. When saving the patient set, enter general comments in the box at the top of the Review Changes page. Comment fields next to the revised data elements can be used to add specificity. The general and data field comments will be stored and displayed in the patient set's audit log.

To save changes to the patient set and continue editing:

1. Click **Save**.

2. Enter comments to document your changes.

3. Click the **Save** button at the bottom of the Review Changes page.

If you would like to save changes, but need to continue the task at a later time:

1. Click **Save**.

2. Enter comments to document your changes.

3. Uncheck the **Forward to next workflow task on Save & Exit** box. When the patient set is saved, it will remain in a Visual Edit Patient Set task assigned to you.

4. Click **Save & Exit**.

If you have finished editing the patient set:

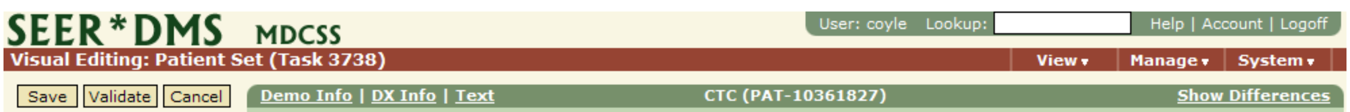
1. Click **Save**.

2. Enter comments to document your changes.

3. Check the **Forward to next workflow task on Save & Exit** box.

4. Click **Save & Exit**. If there are edit errors in the patient set, it will be forwarded to a Resolve Patient Set Errors task. If there are no errors, the patient set will complete the workflow and will be accessible via the Patient Lookup, but not the worklist.

Warning: If you exit a task using controls on or above the menu bar, any changes that you have made will be lost. The menus (View, Manage, System) and the controls in the User Bar (Lookup, Account, Logoff) will take you to other system components without prompting you to save your changes. (The Help link and menu item are exceptions to this rule. The SEER*DMS Help System opens in a separate window, your work will be unchanged and will continue to be displayed in the original window.) Please refer to *SEER*DMS Do's and Don't's* in *Chapter 3: Using SEER*DMS*.



Undoing Changes

Requires system permission: *pat_edit*

You may use the Undo Changes menu item to undo all *unsaved* changes by reloading the patient set from the database. Any changes that you have saved will not be undone. However, all changes are documented in the Audit Log. If you need to reverse a saved change, manually edit the field and enter the original value as recorded in the Audit Log.

To reload the patient set from the database and undo changes made since your last save:

1. Click the menu indicator in the patient navigation box to open the patient set menu.

2. Select **Undo Changes**.

3. Click **OK** to confirm.

Requesting Follow-back Information

Requires system permission: *pat_edit* and *fb_initiate*

In SEER*DMS, a request for follow-back information is referred to as a "follow-back need". If you determine that additional information must be obtained from the reporting facility, you should submit a follow-back need. Your request will be maintained with the record or patient set, allowing all users to review pending follow-back issues when reviewing the data. After submitting the follow-back need, you may continue editing or save the record in a Visual Edit Patient Set task that can be continued at a later time. Methods for saving the record and exiting the task are described in the *Saving Changes to a Patient Set* section of this chapter.

You will receive an e-mail notification when a response to your request is processed and the follow-back need is closed. You or another staff member may update data fields based on the new information. As determined by registry policy, one staff member may be responsible for processing all follow-back responses, or the information may be given directly to the staff members who entered the follow-back needs.

If you suspended a task pending the receipt of follow-back information, you must re-open and complete the task to allow the data to move forward in the workflow. You must either make changes to data fields based on the new information or verify that the appropriate changes were made. If you completed the task but need to update the patient set with the new information, use the Patient Lookup to search for the patient set. Instructions for submitting follow-back requests and processing the responses are provided in *Chapter 22: Follow-back*.